

Episode 5 - Worksheet



CRAFTING THE CLIENT PROFILE : Setting Goals & Metrics Worksheet

Date :

Setting and achieving small goals lets you build confidence with incremental wins and help track your progress toward larger goals so you can make adjustments along the way.

Remember, all goals should be **SMART**:

- **S**pecific: Define exactly what you want to achieve.
- **M**easurable: Determine how you will measure your progress.
- **A**ttainable: Set goals that are realistic and achievable.
- **R**elevant: Ensure that your goals align with your overall objectives.
- **T**imed: Set deadlines to create a sense of urgency.

MINDSET GOALS

BLURB****

1. Take a moment to reflect on what truly drives you to succeed in sales. What motivates you and pushes you to be successful?

2. How will you commit to continuous improvement in your sales career?

3. What sets you apart? Write down some traits or skills that define who you are:

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4. Have you incorporated Healthy Habits into your daily life?

	<i>Never</i>											<i>Always</i>
	0	1	2	3	4	5	6	7	8	9	10	
Healthy Diet:												
Daily Exercise:												
Daily Positivity:												

SET YOUR SALES GOALS

5. Let's dive into some sales metrics for beginners. Set your own goals below to track your progress:

Metrics	Daily Goal	Weekly Goal	Monthly Goal	Quarterly Goal	Yearly Goal
Prospects Added					
Calls					
Email					
Connections Made (In Person/Networking)					
Learning 1 new thing about your Niche					

